



FDMS Version 4.13

Release Notes

Release Date: October 1, 2016

Contents

Release Summary	1
Document Processing – Editable Right Panel Document Metadata Tabs	2
Docket Tree Phase/Sequence Folder	2
Docket Tree Status, Document Type, and Date Received Folders.....	2
Work Queue	3
Reports	4
Docket Manager – Rule Writer Assignment Report	4
Document Status Report	6
Open vs Closed Document Report.....	8
Additional Enhancements.....	10
Defects Addressed	11
Technical Debt	11
Known Issues	11

Release Summary

The FDMS 4.13 Release includes enhancements to Document Processing and Reports. Additional enhancements, defects, and technical debt were addressed as part of the release as well. Some of the key release features include:

- Document Processing – Editable Right Panel Document Metadata Tabs
 - Docket Tree Phase/Sequence Folder Level
 - Docket Tree Status, Document Type, Date Received Folder Level
 - Work Queue
- Reports
 - Docket Manager – Rule Writer Assignment Report
 - Document Status Report
 - Open vs Closed Document Report

Document Processing – Editable Right Panel Document Metadata Tabs

Docket Tree Phase/Sequence Folder Level

When a Phase/Sequence folder is selected in the Docket Tree, the list of documents is displayed in the right panel data grid. When a single document is selected, the Document Management tabs are available for processing in the right panel.

Figure 1 - Docket Tree Phase/Sequence Folder Editable Document Metadata Tabs

The screenshot shows the fdms.gov interface. On the left, the 'Docket Tree' is expanded to 'NA-1'. The right panel shows a table of documents under the 'Document Details' tab. The table has columns: Document ID, Title, Type, Status, Views, Attachments, Pub Submis..., and Total Comm....

Document ID	Title	Type	Status	Views	Attachments	Pub Submis...	Total Comm...
ERULEDEMO-2016-0001-DRAFT-0004	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	OTHER	Pending_Post				
ERULEDEMO-2016-0001-0001	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	NOTICES	Posted			2	2

Count: 2

Docket Tree Status, Document Type, and Date Received Folder Level

When the Status, Document Type, and Date Received folders are selected in the Docket Tree, the list of documents is displayed in the right panel data grid. When a single document is selected, the Document Management tabs are available for processing in the right panel.

Figure 2 - Docket Tree Status, Document Type, and Date Received Folders Editable Document Metadata Tabs

The screenshot shows the fdms.gov interface. On the left, the 'Docket Tree' is expanded to 'NA-1 - Pending_Post'. The right panel shows a table of documents under the 'Document Details' tab. The table has columns: Document ID, Title, Type, Received Date, Views, Attachm..., and Total Comments.

Document ID	Title	Type	Received Date	Views	Attachm...	Total Comments
ERULEDEMO-2016-0001-DRAFT-0002	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	PUBLIC SUBMISSIONS	06/23/2016			1
ERULEDEMO-2016-0001-DRAFT-0003	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	PUBLIC SUBMISSIONS	06/23/2016			1
ERULEDEMO-2016-0001-DRAFT-0004	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	OTHER	06/23/2016			

Count: 3

Work Queue

When a single document is selected, the Document Management tabs are available for processing in the right panel.

Figure 3 - Work Queue Editable Document Metadata Tabs

The screenshot displays the FDMS Work Queue interface. On the left, a table lists documents with columns for ID, Title, Current Assignee, Type, and Status. The first document, ERULEDEMO-2016-0 002-DRAFT-0181, is selected. On the right, the 'Document Details' tab is active, showing a table with columns for User or Group Name, My Dockets, and All Dockets. A red arrow points to the 'Document Details' tab in the top navigation bar.

Work Queue

Document Center | **Batch Options** | **Document Details** | **Optional Details** | **Attachments**

Table shows counts of current document assignments for dockets where you are the Assigned Docket Manager and the total count of document assignments from all Dockets.

Select one or more documents from the list, the user or group you would like to re-assign them to and click the Assign button. It is recommended that you limit the number of re-assignments to no more than 50 at a time.

User or Group Name	My Dockets	All Dockets
<input type="radio"/> AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	0	0

[Select User](#)
Add users to the Document Center

Documents Selected: 1

[Assign to Me](#) [Assigned To:](#)

Reports

Docket Manager – Rule Writer Assignment Report

Provides a list of all Dockets assigned to the selected Docket Manager and/or Rule Writer. The following input fields are available but not required:

- Docket ID
- Assigned Docket Manager
- Assigned Rule Writer

The email address for report delivery is defaulted to the email address in the user profile for the current account. The email address for report delivery can be changed to any valid email address.

Figure 4 - Docket Manager - Rule Writer Assignment Report

The screenshot displays the FDMS web application interface. On the left, a 'Reports Menu' sidebar lists various reports, with 'Docket Manager - Rule Writer Assignment Report' highlighted. The main content area, titled 'Report Parameters', contains the following fields:

- Docket ID:** A dropdown menu with 'Is' selected and an adjacent text input field.
- Assigned Docket Manager:** A dropdown menu with 'Select one'.
- Assigned Rule Writer:** A dropdown menu with 'Select one'.
- Send report to:** A text input field containing 'fdmsuser@eule.com'.

Below the 'Send report to:' field, a note states: 'The report will be sent to this email address. It may take up to 24 hours.' A 'Run Report' button is located at the bottom right of the form. The top navigation bar includes links for 'Admin', 'Reports', 'Batch Jobs', 'Add Docket', and user information for 'AGENCY ADMIN, ERULEDEMO'.

The report is sent to the email address specified with an attached z1p file that contains a CSV file with report output. For detailed instructions on saving and opening this report, please access the Quick Reference Guide included in the Training Resources tab titled *FDMS Tip Sheet – How to Unzip a z1p file*.

The CSV output file contains two tabs:

- Query Overview tab
 - Includes the criteria entered by the user along with the name of the FDMS user who requested the report and the date the report was created.

Figure 5 - Docket Manager - Rule Writer Assignment Report Query Overview Tab

	A	B	C
1	Query Overview		
2	Docket Manager - Rule Writer Assignment Report	Provides a list of all dockets assigned to the selected Docket Manager - Rule Writer.	
3	Send report to	fdmsuser@erule.com	
4	Report created by	Admin, Erule (ERULE)	
5	Report created on	09/22/2016	
6			
7			
8			
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19			
20			

- Docket Manager - Rule Writer tab
 - Includes the output fields:
 - Docket ID
 - Assigned Docket Manager
 - Assigned Rule Writer

Figure 6 - Docket Manager - Rule Writer Assignment Report Output Tab

	A	B	C	D	E	F	G	H	I	J	K	L
1	Docket Manager - Rule Writer Assignment Report											
2	Docket ID	Assigned Docket Manager	Assigned Rule Writer									
3	ERULE-2010-0001	Paris Workshop	Paris Workshop									
4	ERULE-2010-0002	Herings, Allan s ssss (ERULE)	Writer, Erule (ERULE)									
5	ERULE-2010-0003	Manager, Docket (ERULE)	Writer, Erule (ERULE)									
6	ERULE-2010-0004	Staff, Docket (ERULE)	Kom, Marym m (ERULE)									
7	ERULE-2010-0007	Staff, Docket (ERULE)	RW, eruletest ds (ERULE)									
8	ERULE-2010-0009	Manager, Docket freff (ERULESUB1)	RW, eruletest ds (ERULE)									
9	ERULE-2010-0010	Staff, Docket (ERULE)	RW, eruletest ds (ERULE)									
10	ERULE-2010-0011	Staff, Docket (ERULE)	D, Laurence dsdd (ERULE)									
11	ERULE-2010-0012	Jones, Polly (ERULE)	L, Patricia (ERULE)									
12	ERULE-2010-0013	Manager, Docket (ERULE)	RW, eruletest ds (ERULE)									
13	ERULE-2010-0014	Admin, ERULESUB1 middle (ERULESUB1)	RW, eruletest ds (ERULE)									
14	ERULE-2010-0018	Admin, Erule (ERULE)	RW, eruletest ds (ERULE)									
15	ERULE-2010-0019	Herings, Allan s ssss (ERULE)	RW, eruletest ds (ERULE)									
16	ERULE-2010-0020	Admin, Erule (ERULE)	Admin, Erule (ERULE)									
17	ERULE-2010-0021	Admin, ERULE M (ERULE)	Admin, Erule (ERULE)									
18	ERULE-2010-0025	Admin, Erule (ERULE)	RW, eruletest ds (ERULE)									
19	ERULE-2010-0026	Admin, Erule (ERULE)	RW, eruletest ds (ERULE)									

Document Status Report

Provides the ability to view by Status of Documents for a given time period. The following input fields are available and required:

- Date Type
- Date Specified
- Document Status

The email address for report delivery is defaulted to the email address in the user profile for the current account. The email address for report delivery can be changed to any valid email address.

Figure 7 - Document Status Report

The screenshot shows the 'Document Status Report' form in the FDMS interface. The form is titled 'Document Status Report' and includes a description: 'Provides the ability to view by Status of Documents for a given time period. Enter criteria to select data for the report. Fields that you leave empty will be ignored and all values accepted.' The form has three required fields: 'Date Type' (a dropdown menu), 'Date Specified' (a date picker), and 'Document Status' (a list box). The 'Send report to' field is pre-filled with 'fdmsuser@erule.com'. A 'Run Report' button is at the bottom right. The left sidebar shows a 'Reports Menu' with various report options, and the top navigation bar includes links for Admin, Reports, Batch Jobs, Add Docket, and a search bar.

The report is sent to the email address specified with an attached z1p file that contains a CSV file with report output. For detailed instructions on saving and opening this report, please access the Quick Reference Guide included in the Training Resources tab titled *FDMS Tip Sheet – How to Unzip a z1p file*.

The CSV output file contains two tabs:

- Query Overview tab
 - Includes the criteria entered by the user along with the name of the FDMS user who requested the report and the date the report was created.

Figure 8 - Document Status Report Query Overview Tab

	A	B	C	D	E
1	Query Overview				
2	Document Status Report	Provides the ability to view by Status of Documents for a given time period.			
3	Date Specified	greater than 12/01/2015			
4	Document Status	is Posted			
5	Send report to	fdmsuser@erule.com			
6	Date Type	is fr_publish_date			
7	Report created by	AGENCY ADMIN, ERULEDEMO (ERULEDEMO)			
8	Report created on	09/27/2016			
9					
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18					
19					

- Document Status Report tab
 - Includes the output fields:
 - Docket ID
 - Document ID
 - Document Type
 - Document Sub Type
 - Document Status

Figure 9 - Document Status Report Output Tab

	A	B	C	D	E	F	G	H	I	J
1	Document Status Report									
2	Docket ID	Document ID	Document Type	Document Sub Type	Document Status					
3	ERULEDEMO-2016-0001	ERULEDEMO-2016-0001-0001	NOTICES		Posted					
4										
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Open vs Closed Document Report

Provides the ability to select a date and see FR Documents open or opened for comment during that time and FR Documents that closed for comment during that time. The following input fields are available and not required:

- Comment Start Date
- Comment End Date
- Agency configured fields
 - Generic Field
 - Program Field
 - Accept Late Comments

The email address for report delivery is defaulted to the email address in the user profile for the current account. The email address for report delivery can be changed to any valid email address.

Figure 10 - Open vs Closed Document Report

The screenshot displays the FDMS web application interface. On the left is a 'Reports Menu' with a list of reports including 'Customer Service Report', 'Docket Content Report', 'Docket Phase Sequence Report', 'Performance Report', 'Recently Posted Federal Register Items Report', 'Docket Content by Legacy ID Report', 'Docket Manager - Rule Writer Assignment', 'Document Status Report', and 'Open vs Closed Document Report'. The 'Open vs Closed Document Report' is selected. The main content area is titled 'Report Parameters' and contains the following information:

- Open vs Closed Document Report**
- Provides the ability to select a date and see FR Documents open or opened for comment during that time and FR Documents that closed for comment during that time.
- Enter criteria to select data for the report. Fields that you leave empty will be ignored and all values accepted.
- Comment Start Date:** before [dropdown] [date picker]
- Comment End Date:** before [dropdown] [date picker]
- Send report to:** fdmsuser@erule.com
- The report will be sent to this email address. It may take up to 24 hours.
- Run Report** button

The footer of the page includes links: About Us | Privacy & Security Notice | Accessibility | Contact Us | FAQs | Glossary | Regulations.gov | Resource Center | Training.

The report is sent to the email address specified with an attached z1p file that contains a CSV file with report output. For detailed instructions on saving and opening this report, please access the Quick Reference Guide included in the Training Resources tab titled *FDMS Tip Sheet – How to Unzip a z1p file*.

The CSV output file contains two tabs:

- Query Overview tab
 - Includes the criteria entered by the user along with the name of the FDMS user who requested the report and the date the report was created.

Figure 11 - Open vs Closed Document Report Query Overview Tab

	A	B	C	D
1	Query Overview			
2	Open vs Closed Document Report	Provides the ability to select a date and see FR Documents open or opened for comment during that time and FR Documents that closed for comment during that time.		
3	Comment Start Date	greater than 05/03/2016		
4	Send report to	fdmsuser@erule.com		
5	Report created by	AGENCY ADMIN, ERULEDEMO (ERULEDEMO)		
6	Report created on	09/27/2016		
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- Open vs Closed Document Report tab
 - Includes the output fields:
 - Docket ID
 - Document ID
 - Document Type
 - Assigned Docket Manager
 - Open for Comment Date
 - Closed for Comment Date

Figure 12 - Open vs Closed Document Report Output Tab

	A	B	C	D	E	F	G	H
1	Open vs Closed Document Report							
2	Docket ID	Document ID	Document Type	Assigned Docket Manager	Open for Comment Date	Closed for Comment Date		
3	ERULEDEMO-2016-0001	ERULEDEMO-2016-0001-0001	NOTICES	DOCKET MANAGER, ERULEDEMO (ERULEDEMO)	6/23/2016			
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Additional Enhancements

Accessibility

- The colors used in the Report spreadsheets generated through FDMS are now black and white to meet color contrast and accessibility standards.

Batch Processing

- The *Batch Options* tab is now included in the Phase/Sequence Folder view. The tab is enabled regardless of whether any Documents are selected and will display the number of selected Documents at the top of the tab.

Figure 13 - Phase/Sequence Folder Batch Options Tab

The screenshot shows the FDMS interface. On the left is the 'Docket Tree' with a search bar and a list of documents. The main area displays a table of documents under the 'Batch Options' tab. A red arrow points to the 'Batch Options' tab. The table has columns for Document ID, Title, Type, Status, Views, Attachments, Pub Submis..., and Total Comm... The bottom of the table shows a 'Count: 2'.

Document ID	Title	Type	Status	Views	Attachments	Pub Submis...	Total Comm...
ERULEDEMO-2016-0001-DRAFT-0004	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	OTHER	Pending_Post				
ERULEDEMO-2016-0001-0001	New Document created by AGENCY ADMIN, ERULEDEMO (ERULEDEMO)	NOTICES	Posted			2	2

Document Details

- When a user changes the Document Type from Other to Public Submission, the content file becomes an attachment. The Page Count from the Other Document is inherited by that Attachment and calculated in the Public Submission page count.

Footer

- Question regarding file size for FDMS uploads added to the FAQ page.

Global Text Update

- All references to "FDMS 4" are updated to read "FDMS" since the FDMS 3 application was decommissioned on October 1, 2016.

Login Page

- The Rules of Behavior text has been updated.

Self-Registration

- Data validation added after the submit button is clicked to ensure the User ID meets the minimum security requirements listed below:
 - 8-30 characters in length

- Characters can include lowercase letters a-z, the numbers 0-9, and an underscore.

System Generated Emails

- The Help Desk receives a copy of system generated user emails so the emails can be forwarded to the user if there is an issue with receipt from the initial request.

Defects Addressed

Document Details

- After updating the Document Page Count and then the Attachment Page Count for a Document with exactly 1 attachment, the Page Count Sum was not updating correctly.

Technical Debt

Batch/Report Engine

- The libraries used to write programs for Reports and Save Search Results were upgraded.

Known Issues

- None Noted